MOUNTAIN TRENDS

Mountain Trends - Winter - 2015 Edition

Report analyzing the best trends and ideas in ski resorts and destinations

Munich, July 2015

BUN J RIDE · TIGNES

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Summary

Ski resorts and winter destinations face a continuous challenge to set themselves apart from the competition. Worldwide, there are more than 5,000 winter and ski areas/resorts trying to attract skiers and winter guests. In addition to the two most relevant criteria (snow and length of slopes), more and more ski areas and resorts focus on developing innovations and new ideas to differentiate themselves.

Innovation – a central role for resorts

Reto Gurtner (president Laax/Flims, Weisse Arena) stated it very clearly:

> *"Innovations … play an absolutely central role.*
> *By this we do not mean doing new things for the sake of*
> *doing them but innovation as means to an end."* (Reto Gurtner)

Probably he is right to focus on innovations because over 60 percent of resort managers questioned believe that "*guests expect something new every year*" – (Mountain Trends Survey – 2015).

The report addresses the innovation challenge

This report captures that search for innovations and new ideas and is designed to support the executives of winter resorts and destinations in managing these challenges. The report analyzes the most relevant trends for resorts/destinations and presents a large number of case studies of ski resorts and destinations where the trends have already "become reality."

From mega trends to "simply good ideas"

This report covers not only mega trends relevant for ski areas/resorts (e.g., sharing economy) and new ideas based on ski/travel trends (e.g., freeriding, local touch, …) but also presents ideas that are just "simply good."

What makes this trend report unique

- **Focus on mountain and ski resorts** – This report focuses exclusively on trends relevant for mountain and ski resorts/destinations. You do not have to think what vague mega trends and travel trends could mean for your resort – we have done it for you and have also included relevant case studies for each trend.

- **Proven ideas ready to implement by the next winter season** – This report is <u>not</u> a "philosophical trend paper"; instead, it is a practical guide to innovations and new ideas we have seen successfully put into practice in some forerunner resorts. The focus is on giving ski areas/resorts well-structured information needed to quickly implement nearly all ideas presented in time for the next winter season.

- **Case studies, case studies, case studies** – We know that executives prefer case studies of trends "becoming reality." Therefore, over 80 percent of the report consists of case studies. In total, the report 135 pages and 89 trend case studies.

- **Quantitative approach, we quantify the relevance of each innovation** – In all the talk about trends and innovations, what is most important is how relevant and "hot" the trend/innovation really is.

  The key element of our quantitative approach is that the market insiders and readers of the report can <u>rate the trend</u> and see the overall vote and therefore the relevance to the industry. Try the voting for one example yourself - and click <u>here</u> (you can vote only once).

  In addition, the report includes results of a <u>trend survey</u> of ca. 60 industry executives. Among other things, the survey evaluates in which phase of its life cycle key trends/products currently are (e.g., backcountry, uphill, ...).

- **Information ready to use** – We offer well-structured and clear explanations, and our focus is on giving ski areas/resorts the information needed to quickly implement nearly all the ideas presented. Also every case study can be exported as PowerPoint slide and be used directly in your own presentation.

- **Trends you will likely not find anywhere else** – As we have no advertising or advertorials in the study you will find only a limited number of "new" gondolas, groomers, climbing parks, …. We think you will likely see those "trends" and new products featured/advertised also in other media or marketing material. Instead, we focus on ideas, trends, … the resorts/destinations developed more or less on their own.

- **Objectivity, no ads no advertorials** – In order to keep the highest possible level of objectivity in our presentation and analysis, we do not accept any kind of advertising or advertorials in our studies. That is, this study is financed exclusively through being sold to executives in resorts/destinations.

The case studies offer a wealth of information and insights

Mountain Trend #2 – Car sharing to get to the resort
(trend topic - sharing economy goes skiing – travel/mobility)

Description / info:
- In many cities car sharing (Car2Go, DriveNow, …) is becoming more and more popular, but usually the cars may not be taken beyond the city limits.
- Problem: many skiers living in cities have problems getting to the ski resorts/area of their choice.
- The Austrian resort Hochzillertal, for example, therefore offered a special package in cooperation with the car sharing company DriveNow. The package included 24h car use incl. 350km, 1-day ski ticket, welcome drink, and discounts on gear rental. The price for two persons was Euro 165.00.
- There are also other dedicated sites for sharing cars to drive to ski resorts, such as MountainRideShare, TheSkilift, Ski Carpool, …

Impact for ski areas/resorts:
- Especially for ski resorts/areas close to large cities, such as Munich, Vancouver, and Calgary (in many of them, for example, car sharing companies are operating), this could be an effective way to address an urban crowd more and more attracted to the sharing economy.
- Exclusive deals with large car sharing operators might be particularly relevant.
- Relevance: Urban (likely) younger visitors, especially one-day visitors.
- Visitor value added: Alternative way to travel to ski resorts.
- Marketing potential: Great potential – should likely be done in cooperation with car sharing operator.
- Seen in the following ski resorts/areas: Hochzillertal

Links to further information:
- http://blog.drive-now.de/2013/12/16/mit-dem-ski-paket-ins-hochzillertal/
- www.mountainrideshare.com
- www.theskilift.org
- www.skicarpool.org

Please evaluate how "hot" this trend is?
- Very hot
- Hot
- Warm
- Cold

VOTE

Photo: Drive Now

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The case studies are the core content of the report, and in total the report presents nearly 90 trend case studies. They are subdivided into 3 sections:

1 Global mega trends (e.g., sharing economy, connectivity, …) – in total, this section has more than 20 trend case studies where you can see the mega trends implemented in ski resorts.

2 Travel and ski trends (e.g., freeriding/backcountry, local touch, …) – in total, this section has more than 40 trend case studies where you can see the travel/ski trends implemented in ski resorts.

3 Simply good ideas (e.g., Ski BunJRide, …) – in total, this section has more than 20 trend case studies where you can see "simply good ideas" implemented in ski resorts.

1 More information and PowerPoint download

Export the trend case study as PowerPoint slide and use it directly in your own presentation.

Click to get more pictures and/or movies.

2 Vote and rate how "hot" the trend is

As mentioned before, a key goal is to quantify the relevance of the trend. Here industry insiders can rate the trend and then see the overall vote/rating and therefore the trend's relevance to the industry. Try the voting for this example - and click here or click on the "vote" button (you can vote only once).

3 Description of the trend

A short description of the trend focusing on the most relevant issues.

4 Impact for ski areas/resorts

In this section we analyze the impact for ski areas/resorts based on the following criteria: relevant target group, visitor value added, marketing potential, and "seen in the following ski resorts/areas."

5 Links to further information

Here we list links to further information, such as the websites of the resorts featured.

Other case study examples

Case study for mega trend "Connectivity"

Case study for travel/ski trend "Freeriding"

Case study for a "Simply good idea"

PowerPoint Format

Our goal is that the reader can use the ideas and case studies instantly. Therefore every case study can be downloaded in PPt-format and copy-pasted right away in your own presentation. If you want to add or change something in the PPt-slide. No problem, we designed everything "easy to be changed".

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